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ABSTRACT

This paper provides the background for a workshop designed to stimulate interaction between case writers for research and case writers for teaching around the practical challenges of fieldwork. The first section defines the workshop format (panel presentations, group discussions, and a plenary session). It also describes four major issues to be discussed, which include examining whether research case scholars and teachers: face the same difficulties when conducting their fieldwork, run the same risks, use the same solutions, and need the same skills. The second section presents testimonies from two recent research projects, introducing the context of the research projects and discussing challenges encountered. The third section draws on the authors' personal experiences to reflect upon similarities and differences that occur between the two major kinds of case studies. It concludes that personal and psychological factors can be just as demanding as methodological ones, sometimes to the point of undermining the researcher's motivation to pursue. It explains that researchers contemplating casework for the first time should be aware that they will need not just technical skills but also strong psychological and social skills. (SM)

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FACING THE REALITY OF QUALITATIVE RESEARCH:
AN INTERACTIVE WORKSHOP COMPARING TEACHING AND RESEARCH CASE WRITING

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Abstract

Researchers doing qualitative case study research or teaching case studies oftentimes find a gap between textbooks suggesting how to proceed and the realities they are sometimes painfully facing when undertaking the various tasks related to their research. Although there is a myriad of textbooks giving a lot of useful and even practical advice, both the researcher and the teaching case writer are left to their own devices when it comes down to actually conducting their work. The purpose of this paper is to provide the background for a workshop designed to stimulate interaction between case writers for research and case writers for teaching around the practical challenges of fieldwork that are usually ignored by textbooks.

KEYWORDS: Comparing case study designs, qualitative data analysis, practical challenges

INTRODUCTION

The literature is replete with advice on how to conduct qualitative studies. Yet, reading about methodological requirements and actually performing good fieldwork are quite different. Too often textbooks only casually mention where the rubber meets the road, that is how to tackle the practical issues of adapting fieldwork to the particularities of a research project. This observation was the motivation for designing a workshop where various types of case writers could exchange on the problems and solutions of their practice.

This paper differs from a traditional research paper, in that it is designed to serve as a basis for a workshop. In part one, we define the format of the workshop and the four major issues to be discussed. In part two, we present testimonies from two recent research projects. In part three, we draw on our personal experiences to reflect upon similarities and differences that occur between the two major kinds of case studies.

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WORKSHOP FORMAT

The workshop is interactive. Both research and teaching case writers are invited to actively discuss problems and solutions to qualitative case studies on the basis of real-life examples.

The format includes three steps (Table 1):

Step 1: Panel Presentations. The panelists will launch the workshop with three presentations. First, two testimonies will be presented on actual projects. Both are case studies in the management field, but they widely differ in focus and contents. The researchers will expose the practical difficulties they have encountered at various steps of their research. The third panelist will provide a model contrasting the challenges faced by both research oriented and teaching oriented caseworkers. The objective is to guide the audience through the ensuing discussions.

Step 2: Group discussions: Two groups will be formed, one focused on case studies for research, the other focused on case studies for teaching. The goal is to have participants exchange on the practical challenges scholars usually meet while performing each type of work. To facilitate the discussion, a short list of issues will be provided. The discussion format will be adjusted to the audience's preferences. If most attendants favor only one type of case (be it teaching or research), comparative issues will be discussed in the plenary only.

Step 3: Plenary: Following the discussions in groups, a spokesperson from each group will briefly summarize the tenor of the issues identified. A full plenary will follow, where the group issues will be consolidated into an overall discussion. The moderator will ensure that all topics are covered adequately. Using the panelists' experience as illustrations, emphasis will be placed on practical solutions to challenges rather than on abstract recommendations.

TABLE 1. THE WORKSHOP FORMAT AND TIME SCHEDULE

What	Who	How long
PANEL PRESENTATIONS		
Introduction to the workshop objectives	Moderator	5 minutes
Three testimonies	• Case Researcher One	10 minutes
	• Case Researcher Two	10 minutes
	• Teaching Case Writer	10 minutes
GROUP DISCUSSIONS	• Research case group	20 minutes
	• Teaching case group	(in parallel)
PLENARY		
Group 1: Presentation of group work to the plenary	Group 1 spokesperson	5 minutes
Group 2: Presentation of group work to the plenary	Group 2 spokesperson	5 minutes
Discussion of results and conclusions	Plenary	25 minutes
	TOTAL	90 minutes

Questions for discussion: The audience will be invited to discuss four major issues:

- Do research case scholars and teachers face the same difficulties when conducting their fieldwork?
- Do they run the same risks?
- Do they use the same solutions?
- Do they need the same skills?

PRESENTATION OF THE CASE STUDIES

In this section, two testimonies on research-oriented case studies are presented. The case writers will first introduce the context of their research projects. They will then discuss some of the major challenges they have encountered.

CASE STUDY # 1: UNDERSTANDING MULTIPLE STAKEHOLDER RELATIONS

The Context of the Research Case Study

The first study is international in scope. It is an inductive case study with the object of understanding the evolution of the relationships between a multinational firm and its many stakeholders. It asks how multiple firm-stakeholder relations are built and how they are maintained around a high stake gas development project in a foreign developing country. Such projects are very complex by nature and involve a broad set of constituents stemming from different social worlds. Since oil and gas exploration and development are more frequently being conducted in pristine and sensitive regions such as the Amazon rainforest, they are increasingly subject to national and international scrutiny. As a consequence, the respective companies must develop a sense of how to build multiple ties to groups with heterogeneous interests. This is another reason for which this project was chosen as a case study.

The company conducting the project had to deal with a set of unwieldy and interdependent issues, such as how to consult the indigenous people affected by the project, how and where to build the facilities for exploration and extraction, etc. This case demonstrates how multiple firm-stakeholder relations are built while the different parties involved are negotiating on issues, and the ways these issues might be resolved.

Studying the evolution of relationships presupposes a focus on the actions the groups undertake in face of the issues they are dealing with, how they translate and transform the various interests, how they organize themselves, or how others are trying to organize them or the broader situations in which they are embedded. The actors involved are constantly negotiating about the nature of the issues involved and how they might be resolved. This process demonstrates how unconnected actors, bearing a wide variety of interests, come together to agree upon a commonly shared definition of reality. In doing so, they form multiple relations, which in turn implies that how the various issues are discussed and who was able to participate in the negotiations has an influence on the resulting firm-stakeholder relations.

Stakeholders' actions do not take place haphazardly; rather they are influenced by commitments the involved groups make or have made to certain ways of behaving, and by their structural conditions. In other words, tracking multiple relations implies following the logic of the actors' actions, understanding the premises on which they frame issues, their goals and preferred manner of resolving issues, which of these finally asserted itself amongst others, and why so.

Data collection was conducted in various phases, and involved both primary and secondary data sources. It comprises historical as well as current information, gathered from documents, and unstructured and semi-structured interviews both from firm and stakeholder sources. Data should provide information on the actors involved as well as on the issues dealt with. The documents collected so far do contain this information. The database is broad enough to allow for the triangulation of the findings. Data analysis was conducted partly manually and partly with the help of a computer tool. Researching multiple relationships is a complicated analytical task. It requires several steps of data reduction; it also involves adapting research questions and design in an iterative cycle switching back and forth from the data set. The researcher must be able to keep track of the various methodological procedures that have been used and their effects on the quality of the project. The project described above is ongoing and the case writer is now preoccupied with analyzing the data that have so far been gathered. Consequently, the three challenges described below center mainly on data analysis. We will first focus on challenges related to how best to structure the considerable amount of data collected, a technical task also involving psychological challenges. At this stage of the project, it is still not foreseeable where the study will go. This can be somewhat of a strain. Another issue is the development of a manageable coding scheme; this task was complicated by the partial use of computer data analysis, since the computer encourages the development of excessive coding schemes at the expense of analytical clarity. The third issue is related to balancing manual and computer-aided analyses, since in this project at least, the latter could not replace the former. These three issues are discussed in the following paragraphs.

The main challenges

1. Making sense of the data

In this project, the major issue was not to enter the field or even collect the data; it was how to deal with the data once collected. Reading textbooks on data analysis, and conceiving what the first steps of data analysis could be is relatively easy. Actually structuring and performing the analysis of the data of a specific research project is considerably different. One might believe that, having succeeded in collecting considerable amounts of data that seem rich with interesting insights, the research will be motivated to go ahead and plunge into the project. In reality, we felt overwhelmed by the gulf between the mass of data gathered on the one hand and the bounty of textbook advice on the other: How could we draw sense out of the complexity of this case? More than anything else, it felt paralyzing not knowing where all this data examination would lead. It seemed we were closing in on what could be called the limbo of data analysis.

After a first round of data collection, a time-line was drawn for the project. It was based on press releases from the company and on short summaries of articles found in daily newspapers. This time-line is now being extended by more detailed information concerning the various consultation rounds that the company has undertaken during the project, and the issues that have been discussed with the various stakeholders. This time-line serves as a guideline for further analysis. This was our first step in data management. It gave the data more structure. We then had to think of elaborating the analytical framework to better adapt it to the idiosyncrasies of the case. We tried to select a set of management issues as the unit of analysis. It soon became obvious however that the understanding we had so far developed on a number of factors (e.g., what exactly the issues are, how they can be discerned from non-issues, when they can be regarded as resolved) was not clear enough to perform further analysis. Our next step will be to consult the literature and refine the analytical concepts that are still not adequately elaborated. Dealing with the task of making sense of the data was demanding from both an intellectual and a psychological perspective. It proves difficult to remain confident that what you have already accomplished will eventually lead to an acceptable result when you are still finding your way in the forest.

2. Developing manageable coding schemes

Another critical task when faced with a mass of data waiting to be analyzed is developing a manageable coding scheme. We had been advised that inexperienced researchers tended to develop overly elaborate coding schemes. Doing so was even more tempting after we chose a computer software for analyzing our data, on the assumption that it will soon be the state of the art in performing good qualitative research. The program chosen (ATLAS/ti) allows for (grounded) coding and ease of data retrieval. Codes can easily be assigned to text passages just by drag and drop functions. It is easy to understand that it does not take much time to create a huge number of codes just because the program is making the coding task very comfortable. At this stage, the computer does not really help to deal with the complexity of the coding scheme thus developed. It may even make things worse. We first believed that if we were going to use a computer program for completing the data analysis, then we might as well use all of its features and develop a very detailed coding scheme. For example, the program offers options to subsume low-level codes under higher-order categories. Trying them this early was an error. We could not keep on a worthwhile track. This experience showed us that it was more useful to keep the coding scheme simple, and therefore better manageable.

Coding can be carried out in two ways: top-down, informed by an analytical framework developed from the literature; or bottom-up (grounded), emerging from the data, from the insights of the participants' everyday knowledge. In this project, an a priori framework for studying multiple relations has been developed from the literature. It serves as a "theoretical axis" on to which the findings from the field are placed, in order to develop more fine-grained concepts. However, in an inductive study, coding must remain flexible, as new ideas emerge from the data and can enrich the framework itself. The bottom-up analysis approach proved misleading: without clear guidelines in mind, it was difficult to develop a grounded coding scheme that could incorporate emerging patterns. Analysis was getting too complex and time-consuming. Our solution was focus on a limited first round of analysis. We selected a set of interviews that we considered rich enough to develop a model coding scheme suitable for the following interviews. This time, only a limited number of codes were assigned. We expect that the comparison of the passages related to these few codes will help us refine the coding scheme for higher order analysis. We have realized that, especially at the beginning of analysis, patience and confidence are key factors to let patterns emerge from the data.

3. Balancing computer analysis and manual analysis

Using a computer tool to analyze qualitative data is very promising for reasons of efficiency, but also because it makes the analysis more scientifically rigorous. Besides the difficulty of being tempted to carry out a far too complex analysis due to the mere possibilities of the tool, there are also other, less obvious problems related to it. First of all, it is a matter of personality if one feels comfortable performing analysis with the computer. Efficiency and comfort, at least for us, stood opposed to creativity. We found that working with paper and pencil was more helpful in fostering ideas than sitting in front of a screen. This dashed a little our initial excitement of using a computer tool for the analysis. Consequently, we decided to use a double-track procedure for the analysis: first doing the analysis in the traditional manner with paper and pencil, and then using the computer in a second step where it seemed to be most helpful. In any case, there is no alternative to reading and rereading the material. It is important to find a balance between the data to be analyzed manually and data to be stored on a computer for easy later retrieval.

Another matter is that although the program accepts text, image and sound files, text files are the only ones that can comfortably be analyzed due to some of the program's technicalities. Interviews were transcribed onto files. Written documents had to be scanned first, and then transferred into text files for further computer analysis. This process is very time consuming with great amounts of data. This leads the researcher to somewhat question the promises of computer software for data analysis. The practical decision made for this project was to limit scanning to a few select documents.

A third and final difficulty related to balancing manual and computer analysis stems from the various analytical requirements of the project. The program makes the creation of codes and code networks very easy, and nothing can match it to perform a synchronic analysis. Yet it cannot be used to create meaningful time-lines. Of course, this is especially true for the huge amounts of secondary data that have not been, for practical reasons, transferred to the computer for analysis. Although one could theoretically use hyperlinks, this solution is simply unmanageable when the database is too large.

In sum, the practical issues of carrying out raw data analysis that have been described for this project were mostly related to structuring the data with the special consideration of using a computer tool. Computer analysis is heralded by many of its supporters as a method that necessarily increases the scientific rigor of qualitative research. In our case, the initial excitement for computer tools has somewhat been dampened by a critical awareness of their real value: while they do facilitate analysis, they also create new problems and questions. Newcomers to qualitative research especially will be well advised to carefully prepare their use of computers.

CASE STUDY # 2:
CONCEPTUALIZING ORGANIZATIONAL LEGITIMACY IN A PROFESSIONAL CONTEXT

The Context of the Research Case Study

The second case is quite different from the first. This study was driven by two goals: the first was to gain a better understanding of the concept of legitimacy and the second was to understand how legitimacy is managed in a specific organizational setting. To do so we had to look at managerial practices, specifically at a strategic level and also at a level that lies behind the strategic level (a more abstract or fundamental level which reveals the raison d'être of the organization). Since we are discussing the management of intangibles, goals are not always clear. Actions oftentimes look very practical, but upon further investigation, it appears that these actions are also driven by principles proper to the organization and its raison d'être. When we discuss organizational legitimacy, we discuss pertinence, usefulness. And this is particularly true of professional organizations such as professional corporations in Québec that are controlled by a governmental regulatory Office. Recognized professional corporations gain access to privileges; some benefit from a reserved title, others benefit from a reserved title and an exclusive field of practice. These privileges must be won, and then developed further, or at least preserved. An organization must continuously demonstrate over time that it is worthy of its privileges in the eyes of its stakeholders.

For the government, the primary goal of a professional corporation is to protect the public interest. We quickly realized that professional corporations appear to be following, in fact, two basic goals: to conform to regulatory obligations, and to meet their members' expectations. Furthermore, we must note that an corporation is representative of a profession, and so we should add to the two first objectives, a

third: to defend the social status of a profession. Among the various professions, we have chosen to study the Chartered Accountants' (CAs) Corporation in Québec. Many challenges must be faced by the profession at the beginning of this new century, including globalization, deregulation, finding new markets (meeting new demands), developing new competencies, facing competitors from varied emerging disciplines or fields whose boundaries are not well defined, and last but not least, the diminishing importance of auditing, which in the past was the major source of revenues for CAs as well as constituting a major part of their identity and reputation.

In our view, legitimacy is related to the usefulness of an organization. It refers to more than the reputation or credibility of an organization (note that the term "credibility" is not well defined in the literature, but is in fact often used). This is why we assert that legitimacy is a resource, without which the survival of an organization could be in jeopardy. Legitimacy, then, must be properly managed and, in fact, it is managed, although sometimes unconsciously or indirectly. Our inductive research led us to formulate a new model of legitimacy and to define the processes that guide it. With our case study, we were able to propose a definition of legitimacy and its related concept of legitimation. We derived a typology composed of six dimensions of legitimacy and five modes of legitimation. We were also able to gain a good understanding of the processes of legitimization and link them with managerial preoccupations and challenges.

Since this research was inductive, no a priori were defined. Legitimacy is a very important concept for the survival of any organization, as the literature states, but most researchers have remained at an abstract level when studying it. When you approach the field with a concept like this, people tend to react nervously. Two meetings were requested before we were able to enter the field to clearly explain the research goal and the possible consequences related to the findings. This is the first issue we will address below.

Data collection was quite similar to Case Writer A's project. Our own project called for both diachronic (historical) and synchronic (transversal) analysis. Twenty-two in-depth interviews were conducted (about 45 hours of primary source data); these were completed by secondary source data. As with most inductive research projects, unexpected events and the vagaries of fieldwork severely challenged the research design from beginning to end. We have had to, for example, reconsider the methodology several times (while preserving validity and reliability), alter the subject and related research questions, modify the sample, perform analysis with unfamiliar tools, develop a logical argument in the midst of a plethora of data, and finally, resolve the growing tension between the need for abstract-level theorizing and the downward pull of field immersion.

In the following sub-sections we will discuss in more detail three issues: access to critical data and the question of confidentiality, the difficult task of analyzing huge amounts of raw data, and leaving the field to return to a more abstract level of analysis.

The main challenges

1. Access to critical data and the question of confidentiality

The first challenge was to select a field of study, then approach an organization in this field. At this point, you are faced with managers' fears and worries. Since this type of study is oriented towards strategic issues and critical data, questions of confidentiality become central. At first, the directors were hesitant to give the go ahead to our study along with complete access to any kind of data. Questions were asked concerning possible impacts of the study as well as the amount and type of exposure the study could have. Questions such as: Could the researcher make any judgment on the legitimacy or the absence of legitimacy of the organization in general, could he or she judge a goal illegitimate, or perhaps consider certain actions or strategies illegitimate. The central concern being, could this study present a threat of any kind to the organization?

We had to face and respond to all of management's' questioning and fears. After a first meeting with the two main authorities of the organization, they suggested organizing a meeting with all of the directors. The meeting was organized, and in it we explained the concept of our study. The major difficulty we ran into related to vocabulary. We had to make links between the commonly used terms of "credibility" and "reputation" and the term "legitimacy" as used in our research. The discourse was adapted to the field vocabulary, and served as images of the concept of legitimacy. Instead of discussing the management of legitimacy, we discussed the management of credibility and how the preeminence of the CA profession has been preserved over the years. Gradually the anxieties were lowered.

Eight directors, in fact all, were present at the meeting. The chief director proposed that they participate in the study, if all were in agreement. A point of interest to them was that since the CA corporation was in a period of reorientation and questioning, this type of study could help with their own planning and strategies. We assured them the raw data would remain confidential. They asked for a letter of confidentiality, which we agreed to negotiate. Two major points were emerging: the name of the interviewee should not appear in the report, and confidential data on critical dossiers would be disclosed only upon their consent. We agreed on keeping this right of disclosure condition. The major point remaining concerned publication, since this research was carried out in the context of a doctoral dissertation. They asked at first for three years of non-publication (or the right to stop disclosure of critical data), but after several discussions this was reduced to one year.

A letter of confidentiality was prepared in which the Corporation wanted to retain full control of the information contained in the report. Four letters were written involving the researcher, the director of research, the university and the organization. It was difficult to define the contract terms and in the end, no final version was signed. A climate of confidence was being built between the researcher and the subjects in the field, and eventually this confirmed that fears were not well founded. The researcher was always open to explain various aspects of the study and this proved worthwhile. During the study, a paper was prepared for a conference using the organization for the empirical section. Even though the letter of confidentiality had not been finalized, the researcher decided to ask for reconsideration and authorization from the organization. This was another step in gaining the organization's confidence. In the end, the researcher sent the first version of the dissertation to get feedback from the organization, no problems emerged, and only minor corrections were requested. It should be mentioned that the researcher is a member of two accounting organizations (two professional corporations). On the one hand, this contributed to gaining the confidence of the actors involved in the study and also helped a great deal in understanding the context, vocabulary, culture, and significance of actions and strategies. On the other hand, one could say that this situation could cause bias, but being aware of this possibility, we took measures to minimize this eventuality.

2. The difficult task of analyzing a great deal of raw data

Before discussing the challenges related to data analysis, we would like to mention that while you are in the field, you may lose sight of your theories as you are immersed in practical issues. A kind of schism exists between research and practice, and the divide is not always easy to mend. The more you are immersed in the field, the more you adopt the vocabulary and become part of it.

One of the first steps in data analysis is to assess whether enough data, i.e., enough evidence, has been collected. This is a difficult decision to make. It seems at first that you can always extend your field of inquiry, but you must definitely establish boundaries. This process is particularly difficult in inductive and exploratory research: You must return to your research questions and ask yourself if you can answer them. You examine your data and check if triangulation is achieved through the interviews carried out and data provided by secondary sources.

A major challenge arises when data collection is complete. What do we do with such an amount of disordered data: historical data, contemporary data, data with a more a philosophical stance, and data with a more practical bent? Once the data has been sorted through, you must return to a more abstract level of analysis and begin modeling or theorizing, another challenging task (see point 3).

Faced with all the data collected for a study, the researcher is before a kind of labyrinth. This is especially true for exploratory research, in which you collect many types of data. One wonders what is the right entrance, which path should be followed? The solution we adopted was to read and reread all our data, as many times as necessary, until they started to take shape. Then set on writing. This first attempt at composition is not expected to be comprehensive or well planned, but the process itself helps define a certain structure. Finally, we decided to concentrate on three interviews, with three central participants, and try to create a certain categorization of the issues. We then wrote a report (about 60 pages long).

We then had to decide if using a computer program would be helpful. We tried one, ATLAS/ti, which is designed for inductive research. We started coding the three interviews selected, and several categories emerged (in fact, these were mostly strategic elements). Two problems emerged as we worked with ATLAS/ti: the program would not be appropriate for a longitudinal study, and the coding was becoming very time-consuming. What should we do? Also, it was difficult to see how the categorization would be helpful in defining the concept of legitimacy. We decided to abandon the current data and its

categorization for a time, and started a new analysis, this time on the historical data. We carried out a manual analysis on chosen events.

Through these processes of reading, writing, and computer-assisted and manual data analysis, the model of legitimacy and the process of legitimization started to emerge. Subsequently, we returned to the current data, selected specific issues (Atlas was helpful in identifying these because of the strategic elements we had already sorted) and started to analyze them. Paradoxically, we realized then that the historical events would be more useful in understanding the concept of legitimacy, while current issues would be more useful in understanding the process of legitimation, since these are closer to managerial practices and strategies.

3. Leaving the field and returning to a more abstract level of analysis

This step, briefly introduced in the previous section, is similar to the former, but the challenge is at a different level. The research analysis is not comparable to any other step in the project. There is no one best way conduct this analysis, and it must be carried out repeatedly. This is especially critical in qualitative research, and in inductive research, is inevitable. You must be in complete possession of your data, be immersed in it. Links can be built and associative thinking can then take place both consciously and unconsciously. As previously mentioned, in our case, categories emerged suddenly after much analysis. What is perhaps most difficult at this step is returning to theoretical discourse, after having spent so much time with the concrete contents of the field data.

Once you have formed your typology, the analysis becomes less arduous. At this stage, you may be able to test this typology, refine your analysis, or even expand it. Next you must concentrate on explaining from a theoretical point of view the management and other processes you have discovered in the study. Although not easy, this step is crucial, since it defines the main contributions of your research.

In conclusion, carrying out qualitative analysis entails reading and rereading your data; it involves looking for links and categories; it also requires taking notes, writing down observations as soon as they occur, and composing reports. And most importantly, one should always remember that data analysis should be entwined with data collection. This is an iterative process, and the quality of the results will depend on the researcher's ability to absorb data while progressing in the collection of data. By keeping these processes connected, the researcher will conduct a more productive analysis and the findings will be richer, showing greater validity and reliability.

TEACHING VS. RESEARCH CASE WRITING: PRACTICAL CHALLENGES

Teaching Case Writing (**TCW**) and Research Case Writing (**RCW**) share many of the same challenges. Yet they differ in substantial ways. Some of the skills developed in one are transferable to the other, but proficiency in one is no guarantee of proficiency in the other.

In business administration, teaching cases are mainly narratives based on actual corporate data. Students are faced with a real-life situation where a corporation has to make a decision. They are asked to take the place of the executives involved, identify problems to the best of their judgment and propose solutions. Most cases are then discussed in class. Business cases cover a broad range of formats, from the casual vignette (e.g. in business ethics courses) to the elaborate multistage narrative that develops over several dozen pages (e.g. in capstone MBA courses like corporate strategy). Obviously, the challenges the writer faces will not be comparable. To keep with the spirit of the previous two case testimonies, we will focus here on case writing that requires a significant amount of time and resources. We will lump together the lessons from various projects and sketch a comparison of the main practical differences between case writing for research and case writing for teaching.

We will use the four-question framework provided in the introduction, and run it against a standard list of the tasks required by all forms of casework. Table 2 demonstrates where the practical challenges of the two forms of case writing differ most. Empty cells designate areas where the challenges are largely the same. By contrast, cells marked "Specific" indicate when at least one of the two faces challenges that the other does not. Differences are assessed with regards to the main characteristics (dimensions) or these challenges, or to their salience (relative weight). Twenty-three of the 36 cells, or roughly 64%, show a one or two-sided specificity (R for RCW, T for TCW, R T for both).

TABLE 2. WHERE TCW AND RCW DIFFER MOST IN PRACTICAL CHALLENGES

CASE WRITING TASKS	CHALLENGES: TCW VS. RCW			
	Difficulties	Risks	Solutions	Skills
Focal question	Specific R			Specific R
Access		Specific R		
Research Design *	Specific R T		Specific R T	Specific R T
Data Collection		Specific R		
Analysis *	Specific R		Specific R	Specific R
Write-up *	Specific T	Specific R	Specific R T	Specific T
Release	Specific T	Specific T		
Vindication *	Specific R	Specific R	Specific R	Specific R
Ancillary			Specific T	Specific T

R Specificity rests with Research Case Writing (RCW)
T Specificity rests with Teaching Case Writing (TCW)
R T Specificity rests with both
* **Tasks where RCW and TCW differ most**

Table 3 shows how these specificities are distributed across the various challenges. Although impressionistic, these data do provide a starting framework for discussion with some face value. As expected, the specificities involve Research Case Writing (R: 12 mentions out of 23) more often than Teaching Case Writing (T: 6 mentions), and in 5 instances, they involve both R and T, but in individual ways. The table also shows that the specificities are roughly equally distributed across the four challenges.

TABLE 3. DISTRIBUTION OF SPECIFICITIES ACROSS CHALLENGES

	Difficulties	Risks	Solutions	Skills	TOTAL
R (Research)	3	4	2	3	**12**
T (Teaching)	2	1	1	2	**6**
R and T	1	0	2	2	**5**
TOTAL	**6**	**5**	**5**	**7**	**23**

Note. Numbers represent the number of mentions of R, T and R T, in Table 2

All forms of case writing involve a common work baseline: collecting field data around some issue and transforming these data into a compelling text that will pass the test of a public form of evaluation. They follow the same rough sequence of methodological stages (see figure 2), and all require an above-average facility with words. Yet each must be understood individually. The main distinguishing feature between RCW and TCW is their purpose. RCW is aimed at producing some scientific value added, which is subject to the strict canons of public defense before a community of peers (dissertation defense or publication). The stringent standards of the scientific community are the critical issue to consider. In contrast, TCW is aimed at classroom discussion, and the writer should have only one public in mind, the student and his or her learning needs. The critical issue is success in the classroom. Most of the specific challenges faced by the two forms of case writing stem from this fundamental divide. Among the nine tasks of Table 2, we have identified four where they most differ: Research Design, Data Analysis, Write-up, and Vindication.

We now follow the format of Table 2 to discuss the main specificities. Both RCW and TCW are shaped around a focal question (a research topic for RCW, a business problem for TCW). Defining a good question is however considerably more complex for RCW than for TCW. It requires a deep theoretical preparation. Most beginners are hard pressed to find a topic worthy of their discipline, with a potential of warranting an effort of one or more years. By contrast, TCW writers in business administration, including neophytes, can find plenty of topics from their business contacts or from the business press.

Access to a field of study is an issue for both RCW and TCW. The risks are however higher for the former, because the significant prior theoretical investment may be lost if access is denied or unduly prolonged. For some studies, the number of adequate sites is limited, and the researcher is totally

dependent on decisions beyond his or her control. Teaching case writers rarely face such crucial limitations. Their prior investment is lighter, and if anything, they can always try their luck on another company. Nevertheless, the techniques and skills needed for securing access are the same.

Both RCW and TCW must follow a research design. Although the challenges involved are equally important, they widely differ. This is the first area where the two differ most. Research case writers must ensure that their work will be conducted so as to provide defendable answers to scientific questions. Their methodology must guarantee both validity and reliability of data and results. It must also be flexible enough to accommodate the uncertainties and serendipities of the field. In contrast, teaching case writers must think end product rather than methodological process. They ought to start with clear educational objectives, lest their case degenerate into a confusing narrative. Efficiency commands that they determine upfront the fundamental contents of their case: range and difficulty of the concepts students should be confronted with, scope of the situation to be described (number and clarity of issues to include, number of decision-makers involved), complexity of the case (paucity, adequacy or overload of information), or comprehensiveness of the presentation (precise vs. elliptic exposition of facts). The skills required are specific: those of the scholar for RCW, and those of the teacher for TCW.

Data collection raises the same challenges for both RCW and TCW. Both use the customary data sources: documents, interviews and observation. In both cases, the trust of respondents must be earned, notes must be taken, and ideally, data collection and analysis must be mixed. A common challenge is determining the proper amount of data to be collected (i.e., when to stop), which lies somewhere between too little and too much. Both extremes make data analysis problematic, and can jeopardize the whole project. Here, the clarity of the focal question and the research design are invaluable guides to keep the study under control. The only difference lies in the risks of not being able to obtain the proper data. RCW cannot afford to rest on incomplete, questionable or imperfect data. Conditions for TCW are less stringent. Its purpose is not so much to provide a totally accurate reconstruction of reality, but a reasonably credible account of a business situation, where facts can be somewhat accommodated to various needs and constraints.

Data analysis does present a common challenge to both RCW and TCW: keeping the project centered on the focal question. Data overload is frequent. It inevitably leads to procrastination, if not paralysis. One of the main difficulties both kinds of analysts face is accepting to discard large chunks of hard-earned and allegedly "attractive" data, in order to keep the project focused and manageable. Despite these similarities, data analysis is a second area where RCW and TCW most differ. Indeed, unlike their counterparts, research writers are requested to expose a systematic analytic path, where methodological standards must be demonstrated at every step. With the advent of computer packages, analysis techniques are becoming increasingly sophisticated, and researchers are expected to be proficient in them. Research analysis also demands some degree of creativity, which can only be productive if the researcher is well versed in the links between epistemological and methodological issues, a highly specialized skill. Teaching writers are spared this burden. They have no obligation to either theory building or theory testing. They can limit themselves to ad hoc analysis so long as it is roughly acceptable to their field contacts and serves the consistency of the case. Moreover, much of TCW analysis can be delegated without great risk by the principal writer to a trained student. By contrast, delegation is a remote possibility for research casework where normally writers must personally immerse themselves in analysis, lest they lose control of their whole project.

Write-up is no doubt the most demanding task in all forms of casework. It is the third area in which RCW and TCW differ most. The basic skill is the same, a superior facility with compositional structure and the manipulation of ideas through written words. In both cases, the writer must be convincing. The risks are equivalent. Everything else is different. RCW must make a point. The write-up must convince a specialized and particularly demanding public of the truth of the results presented. The difficulty is to balance detailed description with telling syntheses, while building a consistently rational argument throughout the text. The main conclusions must be offered in advance, to guide the readers through the demonstration. Style must yield before persuasion. By contrast, TCW writers are expected no to interfere with the situations they describe. They present facts that should remain open for student discussion, even when some data have been disguised for convenience. Their challenge is to maintain interest in the

narration. The best teaching cases are captivating. They mix flat descriptions with some amount of drama, if not suspense, and with clashes of interests and personalities. A sense of urgency must be built into the case, so that students feel compelled to commit the few hours necessary for serious study. If RCW is a form of rhetoric, TCW is a form of storytelling. The corresponding writing styles are therefore quite distinct, if not opposed in some ways. RCW writing is a craft. TCW writing is both a craft and an art.

Release can be a critical issue for both RCW and TCW, but it often is more so for the latter. Both types of writers frequently encounter early resistance when they start a new project. Both use the same protective strategies, such as written contracts, the co-optation of participants, or some amount of data disguise. However, as RCW respondents come to realize the typically abstract nature of scientific work and results, their resistance usually wanes. Release is in most cases relatively easy to obtain once the people involved have read the final draft. TC Writers by contrast reproduce the harsh realities of corporate life and errors. Executives are often torn between their moral obligation to respond to educational needs and their fiduciary duty to protect the image or interests of their firms. Moreover, people in power, competitive contexts and the relative weights of individual issues may change during fieldwork. Early promises of collaboration are no guarantee. Perhaps more than their research counterparts, TC Writers must continuously face the ominous prospect that their case will not be released in the end.

For both types of cases, vindication depends almost entirely on the work carried out in the previous stages. Vindication is the fourth and last task that profoundly separates RCW from TCW. This time, specificities fall almost entirely with the former. Vindication criteria are stricter for RCW than for TCW, and their consequences are more dramatic. Research results that are unacceptable to the scientific community have no future. By contrast, a teaching case that does not perform well enough in the classroom can often be amended, usually through some rewriting or minor additional research. A teaching note can be produced afterwards to help instructors. Nevertheless, the test of classroom use should not be lightly dismissed. Only a minority of cases are highly successful in class.

Finally, a number of ancillary specificities distinguish RCW and TCW. Most relate to the latter. We have already mentioned the use of assistants and the production of teaching notes. Of growing importance is the trend towards opening case teaching to external sources of information. Students are increasingly asked to complement case data with whatever relevant resources are available on the Web. Teaching cases are becoming dynamic databases. New challenges and new skills will therefore be demanded of teaching case writers, and of teachers and students at the same time.

To conclude, we believe that a comparison of the challenges researchers face in each of the two main types of case writing -- research and teaching -- is worthwhile. It helps better understand the dynamics pertaining to each, and it allows a more profound exploration of the various dimensions of qualitative work in general. In this section, we have tried to show that although broadly similar in many ways, the practical challenges encountered in the reality of fieldwork showed several important specificities for research and teaching, which were related to the differences in the fundamental purpose of each one.

CONCLUSION

Good books on qualitative research abound. Yet researchers, especially when they lack experience, can easily be hindered by several unexpected challenges once in the field. In this paper, we have tried to illustrate what we think are some of the most important.

Our experience shows that personal and psychological factors can be just as demanding as methodological ones, sometimes to the point of undermining a researcher's motivation to pursue. Surprisingly, few confessions about the personal ups and downs of qualitative researchers appear in print. Yet, this reality is part and parcel of the experience of practicing casework. We hope this workshop will have shown that, however inevitable they can be, these frequent obstacles can also be productive, and generate creative leaps forward.

Researchers contemplating casework for the first time should therefore be conscious that they will need more than just technical skills. They will also need strong psychological skills, like a great deal of self-criticism, stamina, and not least, a high level of self-confidence. They will need social skills as well. Stepping back from the project once in a while, discussing the progress and the obstacles encountered with friends, putting the work underway under the scrutiny of colleagues, are prerequisites to achieving higher levels of excellence. Unlike what many seem to believe, case writing can just as much be a collective effort as a lonely endeavor.

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